Nottingham Trent University

Choose Your Own Alma Adventure

Figuring out e-collection workflows at NTU

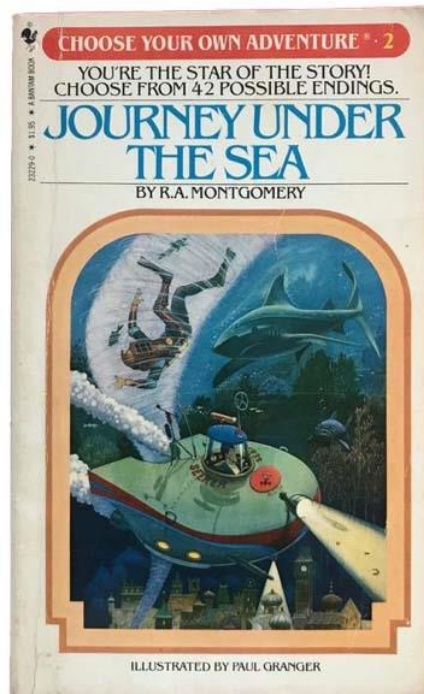**Lee Houghton**

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Choose Your Own Adventure

- Series of children's gamebooks popular in the 80's and 90's

- Reader chooses from multiple protagonists

- After a few pages of reading protagonist faces 2 or 3 options, leading to further pages and further options

- Eventually arrive at one of many endings

- The reader is pulled back and forth through the pages of the book

- Repeat readings often lead to a different ending

Choose Your Own Alma Adventure

- Background
- Guiding principles
- Challenge 1: Collate standalone portfolios into e-collections
- Challenge 2: Link local collections to Community Zone
- Challenge 3: Updating collections
- Challenge 4: Activating new collections
- Challenge 5: Tracking e-collection information
- Future plans

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Background

Background

- Launched Alma in January 2022

- Aleph – Alma migration project completed entirely remotely

- Metadata and Discovery Team responsible for e-records management

- 4 Metadata and Discovery Librarians, mix of full- and part-time posts

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Guiding principles

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Guiding principles

- Collate standalone portfolios into e-collections:
  - To match the Community Zone model
  - More bulk jobs and tools available for e-collections
  - Standalones eradicated by end of May 2023
- Link collections to the CZ:
  - Let CZ manage our portfolios – alleviate workloads
  - Automatic updates particularly beneficial
  - Trust the accuracy of the CZ and just manage exceptions
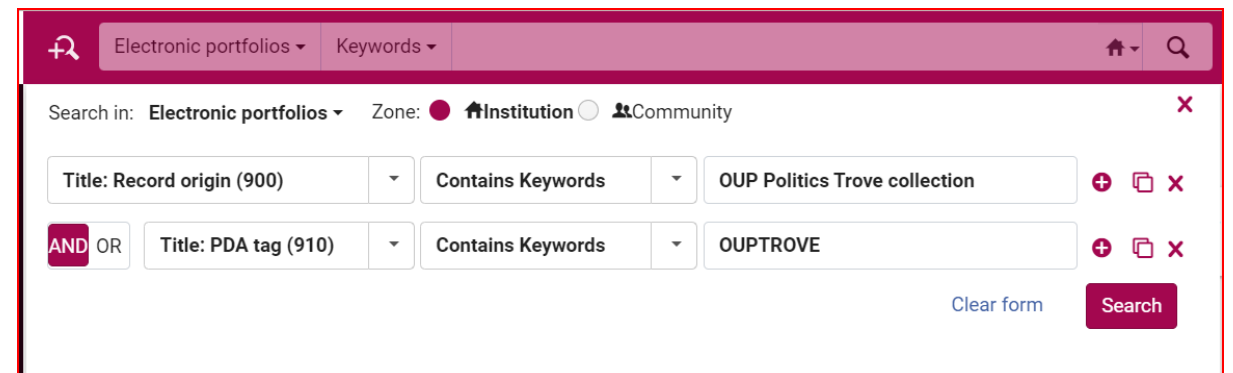
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Challenge 1

Collate standalone portfolios into e-collections

Collate standalone portfolios into e-collections

- Had to identify commonality between records from the same package

- Lucky that Aleph MARC records contained codes and set statements in local fields

- Built sets using advanced search ➡ Used to create local collections

700	1_	a Jackson, Robert H.	t Introduction to international relations.	s Seventh edition.
776	08	i Print version :	z 9780198862208
830	_0	a Politics trove.
856	40	u http://dx.doi.org/10.1093/hepl/9780198862208.001.0001	y electronic book	4 no copyright message
900	__	a This eBook is part of the OUP Politics Trove collection
910	__	a OUPTROVE	z OUPTROVE

Challenge 2

Link local collections to Community Zone

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Link local collections to Community Zone

- Is it possible? Check local records contain ISBNs/ISSNs

Link local collections to Community Zone

- Which CZ collection? So many to choose from…

- We search CZ collection list spreadsheet to look for candidates – taking note of number of portfolios and update date

	Electronic Collect ▾	Electronic Collection Public Name	▾	No. of Portfolio ▾	Last Update Date ▾
0	611000000000002653	Cambridge Companions Complete Collection		830	29/04/2023
3	612560000000000004	Cambridge Companions to Philosophy, Religion and Culture		263	29/04/2023
4	612560000000000005	Cambridge Companions to Literature & Classics		442	27/04/2023
5	612560000000000006	Cambridge Companions to Music		91	03/04/2023

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Link local collections to Community Zone

- Overlap and Collection Analysis tool is used to compare more than one candidate CZ collection with our local collection.

- Link to CZ collection with best coverage based on an ISBN/ISSN match

Analyzed Collection

	Electronic coll...	Collection ID	Number of Uni...	Number of por...	Scope
1	Oxford University Press Politics Trove	6116589731...	58	58	Institution Zone

Compared With
Selected collections from Community Zone

	Electronic coll...	Collection ID	Number of Uni...	Number of por...	Scope
1	Politics Trove	6154100000...	46	46	Community Zone
2	Bacon Oxford University Press Global Politics Trove $OUP_GLOB... TROVE	6143300000...	63	63	Community Zone

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Challenge 3

Updating collections

Updating collections

- Method used for collections that are not set to auto-update
- Aim to create subset of records to add or remove, rather than refresh the whole collection
- Prepare a file for import using MarcEdit.

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Updating collections

- Retrieve all ISBNs from supplier MARC file and paste into Excel file

Updating collections

- Overlap and Collection Analysis > Look up Titles report compares ISBNs from supplier file against Institution Zone holdings

Updating collections

- All ISBNs on the 'No Matches or No Resources' tab are new titles

- Matches that do **not** list the collection we're updating are also new titles

	Title	ISBN(Matching Identifier)	MMS ID	Collection	Interface
1	{"Research methods in human resource management : investing a business issue."}	9780749483883	{"990013314690107181"}	{"CIPD Kogan Books"}	{}
2	{"Leading managing and developing people."}	9781843984375	{"990013314590107181"}	{"CIPD Kogan Books"}	{}
3	{"Resourcing and talent management the theory and practice of recruiting and developing a workforce /"}	9781398600508	{"9917631605307181"}	{"VLeBooks"}	{"Browns Books for Students"}
4	{"Human Resource Management at Work."}	9781843984368	{"990013314720107181"}	{"CIPD Kogan Books"}	{}
5					

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Updating collections

- MarcEdit can take a text file of new ISBNs and extract a subset of records from the supplier file, ready to be picked up by an Alma import profile
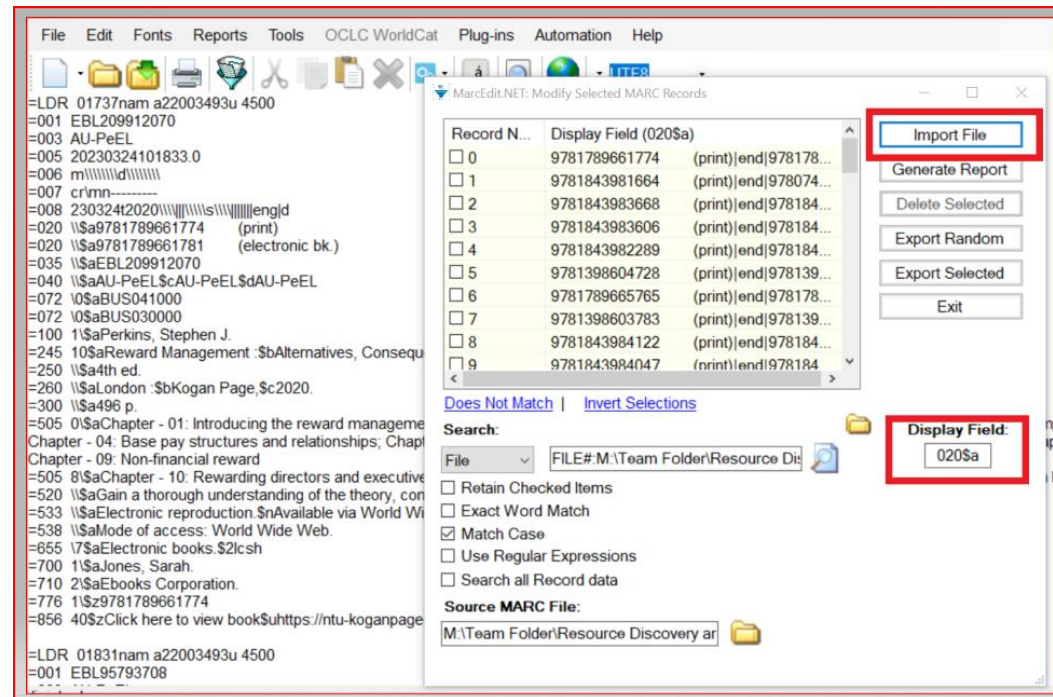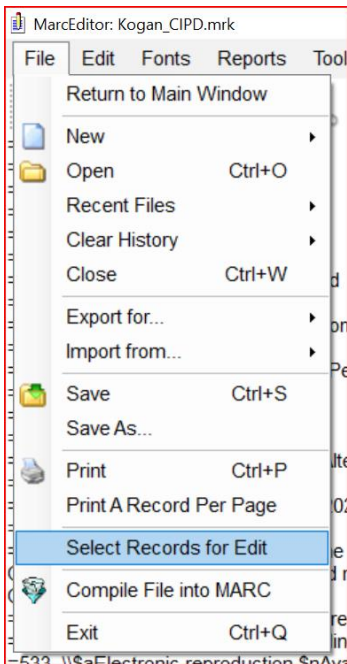
Updating collections

- Portfolios can be linked to the CZ at the point they are imported, or after they have joined the collection

Challenge 4

Activating new collections

Activating new collections

- Decision path branches into whether a new collection can utilise the CZ or has to remain local

- Overlap and Collection Analysis tool can still be used to compare title list of new collection against candidate CZ collections

- Activate CZ candidate collection > Ensure service not available to prevent discovery > Compare CZ to supplier title list with 'Look Up Titles' report

- Strong overlap + good quality bib records = decision to utilise CZ

- If service also set to auto-update, new collection will be fully CZ-managed

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Activating new collections

- If no appropriate collection in the CZ, new collection will be fully locally managed

- Local collections created from Alma resources menu and populated by import profile

- Hybrid collections are most common – most portfolios linked to CZ, remainder stay local but can be converted if CZ package is updated.

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Challenge 5

Tracking e-collection information

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Tracking e-collection information

- Collection record 'Internal description' field records key information about collections

- Chosen because it shows up on analytics reports

Tracking e-collection information

- Update collection record with any general notes (Electronic collection > Edit Collection > Notes tab > Add note > type in note > Add)

Useful information to add as notes:

- Why the collection wasn't linked to the CZ (e.g. no suitable collection, collection not up to date)

Future plans

Future plans

Integrations

- Used Ebook Central since Day 1.
- Recently activated Springer eBooks.
- Job reports still need to be checked and acted upon.

Developing robust QA processes

- Necessary because quality of CZ bib records is still variable.
- New Bibliographic Rank will help us define what a "good enough" MARC record looks like.

CZ updates task list

- Records activity of collections that are set to auto-update.
- What does each type of update mean? Which updates require staff intervention?

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